Number: MB-280
Passing Score: 800
Time Limit: 120
File Version: 4.0

Exam Code: MB-280

Exam Name: Microsoft Dynamics 365 Customer Experience Analyst

Exam A

QUESTION 1
You need to configure the required audit settings.
Which two actions should you perform? Each correct answer presents part of Ihe solution. Choose two. NOTE: Each correct selection is worth one point.

A. Enable auditing on the Dietary requirements column.
B. Enable auditing on the Pet table.
C. Enable auditing on the Contact tab\e.
D. Enable auditing on the Email address column.
E. Enable Start read auditing in system settings.
F. Enable Audit user access in system settings.

Correct Answer: A, B
Section:
Explanation:
Enable Auditing on Columns (Options A and D):
Enabling auditing on specific columns like Dietary requirements and Email address ensures that any changes to these fields are tracked. This meets Terra Flora's requirement to log changes to these fields along with details of who made the changes and the timestamp.
Enable Auditing on Pet and Contact Tables (Options B and C):
By enabling auditing at the table level for Pet and Contact, you ensure that any updates to these tables, including changes to all associated columns, are recorded. This broad setting ensures full coverage of auditing for both tables.
Enable Audit User Access (Option F):
This option is recommended to track when users access certain data, which can help with compliance and monitoring user interactions with sensitive data.
Option E (Start Read Auditing):
Read auditing tracks when records are read. If compliance requires monitoring every time a record is accessed, enabling this could be necessary; however, the primary focus is on modifications rather than access alone.
Reference from Microsoft Documentation:
For setting up auditing, see Auditing overview for Dynamics 365.

QUESTION 2
You need to ensure the active stage of the business process flow is visible in the view. Which two actions should you perform? Each correct answer presents a complete solution. Choose two. NOTE: Each correct selection is worth one point.

A. Add a page for the Onboard new pet table to the Sales Professional app.
B. Add columns from the stable to the Active Onboard new pet view.
C. Add columns from the Pet table to the All Onboard new pet view.
D. Create a new column on the Pet table named 'Onboarding stage' and add it to the Active pets view.

Correct Answer: B, D
Section:
Explanation:
Adding Columns to the Active Onboard New Pet View (Option B):
To display the current active stage of the 'Onboard new pet' business process flow, you need to ensure that the Active Onboard new pet view includes relevant columns from the Pet table, specifically those tracking process flow stages.
Creating and Adding a New 'Onboarding Stage' Column (Option D):

Creating a column such as 'Onboarding stage' on the Pet table helps track the active stage of the onboarding process directly within the view. This allows users to see at a glance which stage each pet is in without navigating away from the main view.
Other Options:
Option A (Adding a page) refers to modifying the app's navigation, which doesn't directly impact the visibility of the business process flow stage.
Option C (All Onboard New Pet View) may not be as relevant if you only need to focus on active onboarding records rather than all records.
Reference from Microsoft Documentation:
For configuring views and columns in Dynamics 365, refer to Create and edit views.

QUESTION 3
You need to update the role configuration for the digital sales team to enable the capability requested. What two actions should you perform? Each correct answer presents part of the solution. Choose two. NOTE: Each correct selection is worth one point.

A. Grant View Audit Summary permissions to the Digital seller security role.
B. Assign the Sales Copilot user role to the members of the digital sales team.
C. Grant View Audit History permissions to the Digital seller security role.
D. Grant View Audit Partitions permissions to the Digital seller security role.

Correct Answer: B, C
Section:
Explanation:
To enable the digital sales team's request to use Copilot for summarizing changes to lead records, you need to ensure that they have the necessary permissions and access to the required features. Here's how to proceed:
Assign the Sales Copilot User Role:
Dynamics 365 Copilot in Sales is a feature that assists users by providing insights and summaries based on data within the system.
To allow the digital sales team to access and utilize Copilot's capabilities, they must have the Sales Copilot user role assigned. This role enables users to interact with Copilot and benefit from its AI-driven functionalities such as summarizing changes and insights in records.
Microsoft Documentation
Reference: Dynamics 365 Sales Copilot Setup
Grant View Audit History Permissions:
The View Audit History permission is essential for team members to access audit logs, which is necessary for reviewing and summarizing changes made to lead records.
Enabling this permission will allow the digital sales team to view a history of modifications in lead records, thus allowing them to generate summaries based on this audit trail.
The View Audit Summary permission specifically lets them see summaries of audit data, which complements Copilot's functionality by allowing Copilot to access detailed change history for summarization.
Microsoft Documentation Reference: Security Roles and Privileges
By implementing these two actions, the digital sales team will have both the necessary access to Copilot features and the required permissions to audit lead record changes, enabling them to leverage Copilot for summarizing changes to leads effectively.

QUESTION 4
A company is implementing the Dynamics 365 Sales mobile app.
The company requires setup of several push notifications for sellers who use the app.
You need to create the push notifications.
Which feature should you use?

A. Plug-in
B. Cloud flow
C. Classic Dataverse workflow

Correct Answer: B
Section:
Explanation:
Understanding the Requirement:

The company wants to send push notifications to sellers using the Dynamics 365 Sales mobile app. This requires setting up automated notifications triggered by certain events or conditions.
Solution - Using Cloud Flows:
Cloud flows in Power Automate are ideal for creating automated workflows that can trigger push notifications based on events in Dynamics 365.
Power Automate provides connectors for Dynamics 365 Sales and mobile notifications, enabling the setup of push notifications without requiring custom code or plugins.
Steps to Create a Cloud Flow for Push Notifications:
Go to Power Automate and create a new Cloud Flow.
Set up a trigger based on a Dynamics 365 event (e.g., when a record is created or updated).
Add an action to send a push notification to the user's mobile device.
Customize the notification message and publish the flow to activate the notifications.
Using Cloud Flows in Power Automate enables dynamic push notifications for mobile users, providing timely updates to sales team members based on real-time data changes.

QUESTION 5
DRAG DROP
A company uses Dynamics 365 Sales with assignment rules. The assignment rules use a segment to filter the lead records.
A sales manager wants to automatically add a series of tasks by using the same criteria as the assignment rules.
You need to create the tasks and assign the tasks to the lead records.
In which order should you perform the actions? To answer, move all actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

Actions

- Create a sequence.
- Add tasks to the sequence.
- Connect the existing segment to the sequence.
- Activate the sequence.

Answer area

Correct Answer:

Actions

Answer area

- Create a sequence.
- Add tasks to the sequence.
- Connect the existing segment to the sequence.
- Activate the sequence.

Section:
Explanation:
Add Tasks to the Sequence:
After creating the sequence, add the specific tasks that need to be automatically generated and assigned to the leads. These tasks can be calls, follow-ups, emails, etc., that need to be completed as part of the sales process.
Connect the Existing Segment to the Sequence:

Once the tasks are added, connect the sequence to the existing segment that filters the lead records based on assignment rules. This ensures that only leads within this specific segment are targeted by the sequence.
The segment is a subset of leads that meet certain criteria, and connecting it to the sequence allows for automated task assignment according to the segment's filtering rules.
Activate the Sequence:
Finally, activate the sequence to begin the automated assignment of tasks to lead records that meet the segment criteria. Activation makes the sequence live, enabling the automated process to assign tasks to each lead as per the sequence setup.
By following these steps, the sales manager can ensure that tasks are automatically generated and assigned to leads according to the same criteria used by the assignment rules, streamlining task management for the sales team.

QUESTION 6
HOTSPOT
The founder has edited the Salesperson security role to allow the carer to use the Corgi meet-up business process flow, as shown in the following

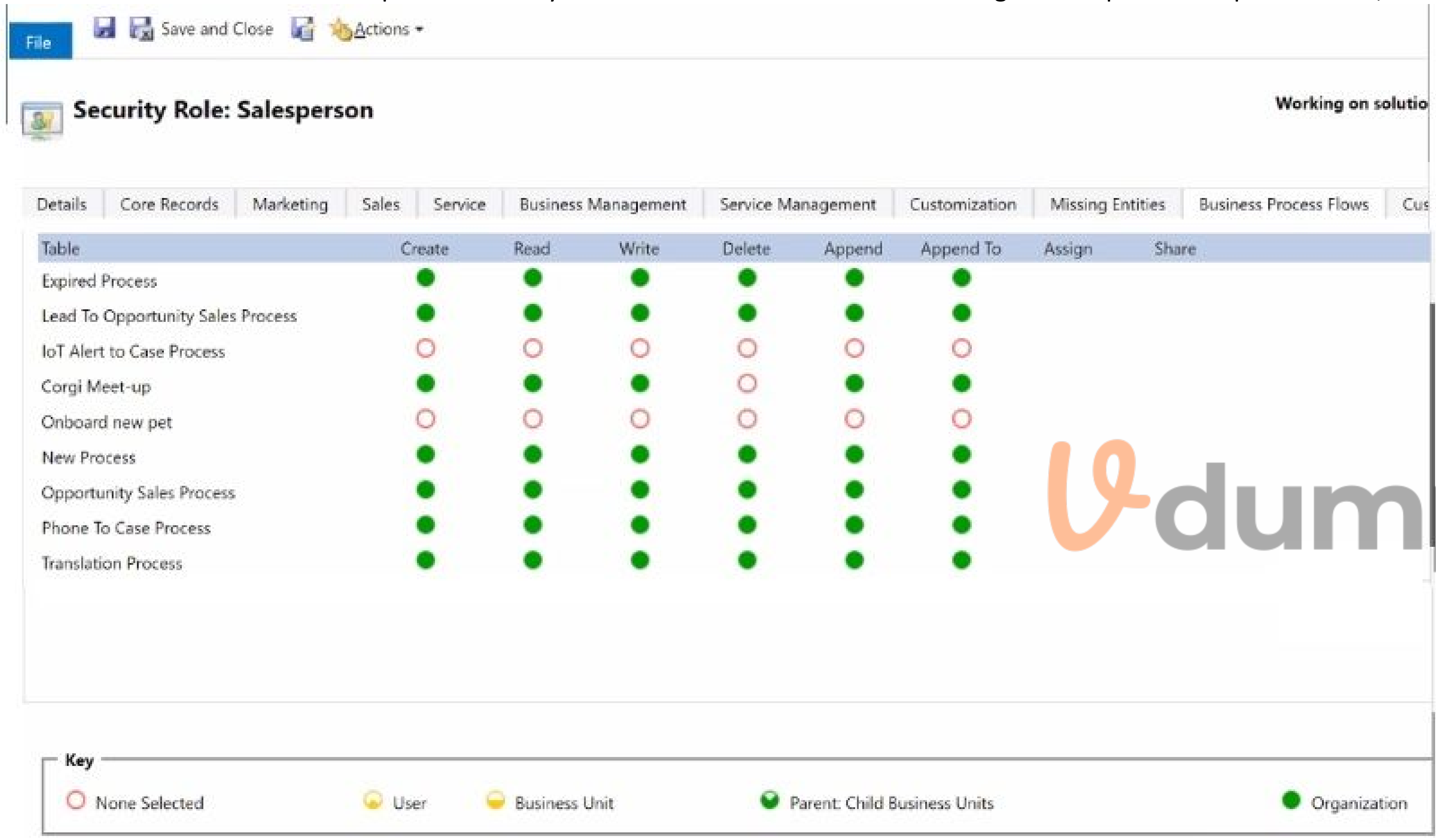
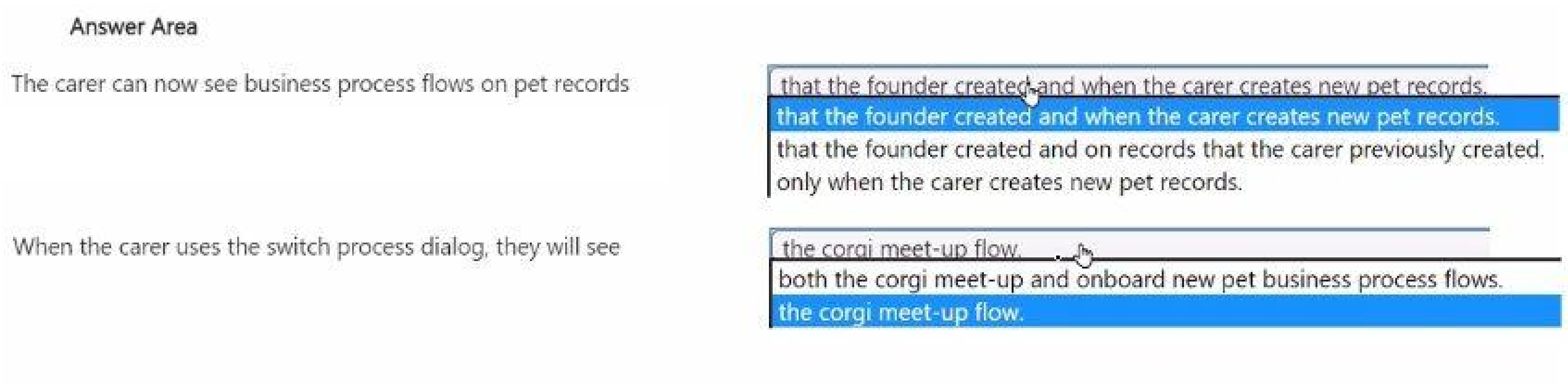


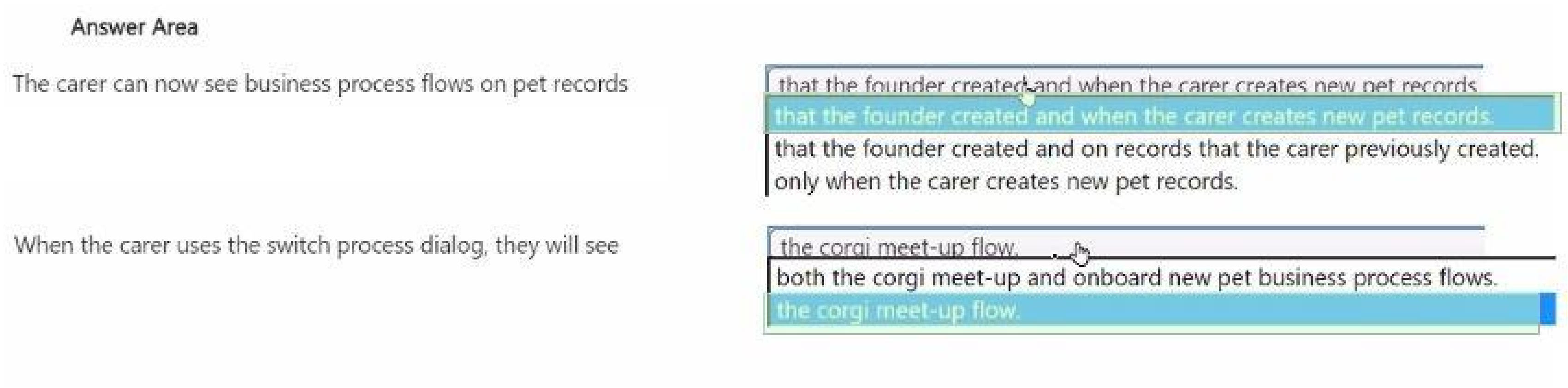
Table	Create	Read	Write	Delete	Append	Append To	Assign	Share
Expired Process	●	●	●	●	●	●		
Lead To Opportunity Sales Process	●	●	●	●	●	●		
IoT Alert to Case Process	○	○	○	○	○	○		
Corgi Meet-up	●	●	●	○	●	●		
Onboard new pet	○	○	○	○	○	○		
New Process	●	●	●	●	●	●		
Opportunity Sales Process	●	●	●	●	●	●		
Phone To Case Process	●	●	●	●	●	●		
Translation Process	●	●	●	●	●	●		

Use the drop-down menus to select the answer choice that completes each statement based on the information presented in the exhibit. NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:



Section:
Explanation:

QUESTION 7
You need to configure search to ensure the administrators can find all records which reference Corgis. Which action must you perform?

A. Within system settings, select up to 10 relevant tables.
B. Within the solution, ensure all relevant tables are indexed.
C. For all relevant tables, ensure that the Can enable sync to external search index setting is False.
D. Add columns to be searched to the Lookup view for each relevant table.

Correct Answer: B
Section:
Explanation:
To enable comprehensive search capabilities for administrators to find all records referencing specific terms (such as "Corgis"), it is essential to ensure that all relevant tables are indexed.
In Dynamics 365, configuring search functionality for specific tables involves setting up the tables to be searchable, which can be done by indexing them within the solution.
Indexing relevant tables makes them accessible in the search feature and ensures all fields within those tables can be searched, allowing for quick retrieval of records that reference specific terms.
System settings (Option A) is limited to selecting up to 10 tables and is more about quick search rather than full indexing. The sync to external search index setting (Option C) is for integration with external search tools and does not directly impact internal search capabilities.
Adding columns to the Lookup view (Option D) affects how lookups work but does not influence full-text search results.
Reference from Microsoft Documentation:
For configuring search indexing, refer to Configure relevance search in Dynamics 365 for more information on indexing tables to enhance search capabilities.

QUESTION 8
You have added the timeline control to the Pet main form, then saved and published your changes. You need to configure the timeline to display related Pet activities as required by Terra Flora. Which two actions should you perform? Each correct answer presents a complete solution. Choose two, NOTE: Each correct selection is worth one point.

A. In the Record types of the timeline settings, uncheck the Notes option.
B. In the Activity area of the timeline settings, remove all activity types, except for Task. Email and Phone Call.
C. In the Record types of the timeline settings, uncheck the Posts option.
D. In the Record types of the timeline settings, uncheck the Activities option.
E. In the Notes area of the timeline settings, uncheck the Remove notes title when authoring option.

Correct Answer: B, C
Section:
Explanation:
The timeline control in Dynamics 365 allows users to view and interact with activities, notes, and posts associated with a record. To meet Terra Flora's requirements for displaying specific activities, you need to customize the timeline to show only certain activity types.

Removing All Other Activity Types Except Task, Email, and Phone Call (Option B):
According to Terra Flora's requirements, only Tasks, Emails, and Phone Calls should appear in the timeline for Pet records. Therefore, removing all other activity types ensures that only the relevant activities are shown. This customization is achieved in the timeline settings by unchecking unnecessary activity types.
Unchecking the Posts Option (Option C):
Since Terra Flora specified that posts should not appear on the timeline, you should uncheck the Posts option under the Record types settings in the timeline configuration. This action removes posts from the view, aligning with Terra Flora's requirement to exclude posts from the Pet records timeline.
Other Options Explanation:
Unchecking Notes (Option A) would prevent users from adding or viewing notes, which Terra Flora requires.
Unchecking the Activities Option (Option D) would disable all activities on the timeline, which does not meet Terra Flora's needs as they require Task, Email, and Phone Call activities.
Option E deals with the display format of notes but does not restrict their visibility, which does not align with the requirement to exclude posts specifically.
Reference from Microsoft Documentation:
For configuring and customizing the timeline control, refer to Customize a timeline control in Dynamics 365 documentation for detailed steps on modifying timeline settings and activity visibility.

QUESTION 9
You need to identify the duplicate pet records, so they can be manually merged by the carer. What must you create?

A. Two duplicate detection jobs and two duplicate detection rules
B. One duplicate detection job and three duplicate detection rules.
C. Two duplicate detection jobs and three duplicate detection rules.
D. Three duplicate detection rules only.

Correct Answer: B
Section:
Explanation:
To identify duplicate records, you need to configure both duplicate detection rules and duplicate detection jobs.
Since Terra Flora requires identifying duplicate pet records across various fields, creating three duplicate detection rules is likely necessary to cover different columns (such as name, breed, and dietary requirements) in the Pet table.
One duplicate detection job is sufficient to run these rules concurrently, scanning the database for duplicates across the specified columns. This job can be scheduled or run manually.
Option B is correct as it ensures comprehensive coverage with three rules addressing various fields and one job to manage the duplicate detection process.
Reference from Microsoft Documentation:
For guidance on setting up duplicate detection jobs and rules, refer to Detect duplicate records in Dynamics 365.

QUESTION 10
DRAG DROP
You need to configure a new Customer Insights - Journeys form to satisfy the digital sales team lead's request.
Which five required actions should you perform in sequence? To answer, move the five appropriate actions from the list of actions to the answer are a. Arrange the five actions in the correct order.

Select and Place:

Actions

- Set the form duplicate records strategy to the audience default strategy.
- Set the form target audience to leads.
- Create a custom matching strategy.
- Create a new form.
- Set the form target audience to contacts.
- Select a form template.
- Set the form duplicate records strategy to the custom form matching strategy.
- Publish the form.

Order

Correct Answer:

Actions

- Create a custom matching strategy.
- Set the form target audience to contacts.
- Set the form duplicate records strategy to the custom form matching strategy.

Order

- Create a new form.
- Select a form template.
- Set the form target audience to leads.
- Set the form duplicate records strategy to the audience default strategy.
- Publish the form.

Section:
Explanation:

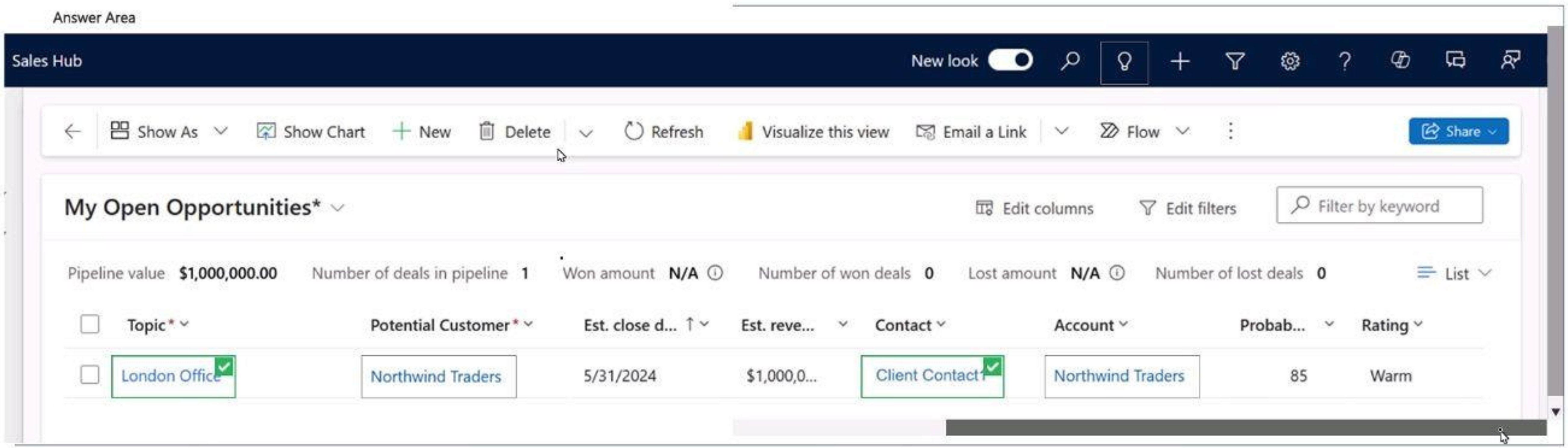
QUESTION 11
You need to build a trigger-based journey to send the 'Getting started' emails requested by the global sales lead. Which trigger should you use to start the journey?

A. Dataverse record change trigger
B. Custom trigger with lead profile data
C. Custom trigger with contact profile data
D. Email Link Clicked interaction trigger

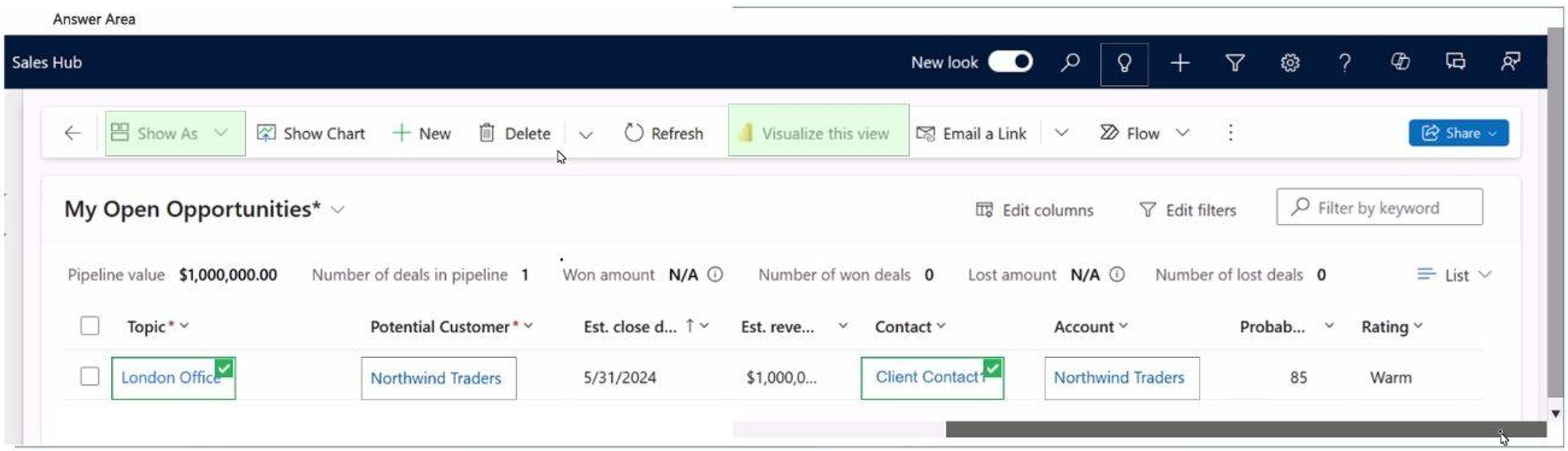
Correct Answer: A
Section:
Explanation:
To build a trigger-based journey that sends 'Getting started' emails when an opportunity is marked as 'Won,' the appropriate trigger to use is the Dataverse record change trigger. This trigger is specifically designed to initiate actions based on changes in Microsoft Dataverse records, which are integral to Dynamics 365.
Here's the detailed reasoning:
Dataverse Record Change Trigger:
The Dataverse record change trigger is used to initiate journeys when there is a change in a record within Dataverse, such as an opportunity's status.
Since the requirement is to send a 'Getting started' email once an opportunity status changes to 'Won,' this trigger can detect the status update in real-time.
Using this trigger, you can specify the criteria for the journey to start, such as filtering for opportunities with a status of 'Won,' thus automating the email sending based on this condition.
Why Not Other Triggers?
Custom trigger with lead profile data and Custom trigger with contact profile data: These are generally used for initiating journeys based on custom events or data points outside of standard Dataverse records, which isn't applicable here as the journey is triggered by an opportunity status change, a native Dataverse record.
Email Link Clicked Interaction Trigger: This trigger is used to follow up after an email link is clicked, which does not align with the scenario. The journey must start based on an opportunity status change, not email interaction.
Microsoft Dynamics 365
Reference:
Create and manage trigger-based journeys
Work with Dataverse triggers in journeys
By using the Dataverse record change trigger, you ensure that the journey aligns directly with the sales process and automatically sends the 'Getting started' email when an opportunity reaches the 'Won' status, as requested by the global sales lead.

QUESTION 12
HOTSPOT
BDM1 has returned from vacation and needs to catch up on their scheduled tasks and activities.
Which two items can BMD1 select to see a reminder card for the meeting BDM2 scheduled in the assistant? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:



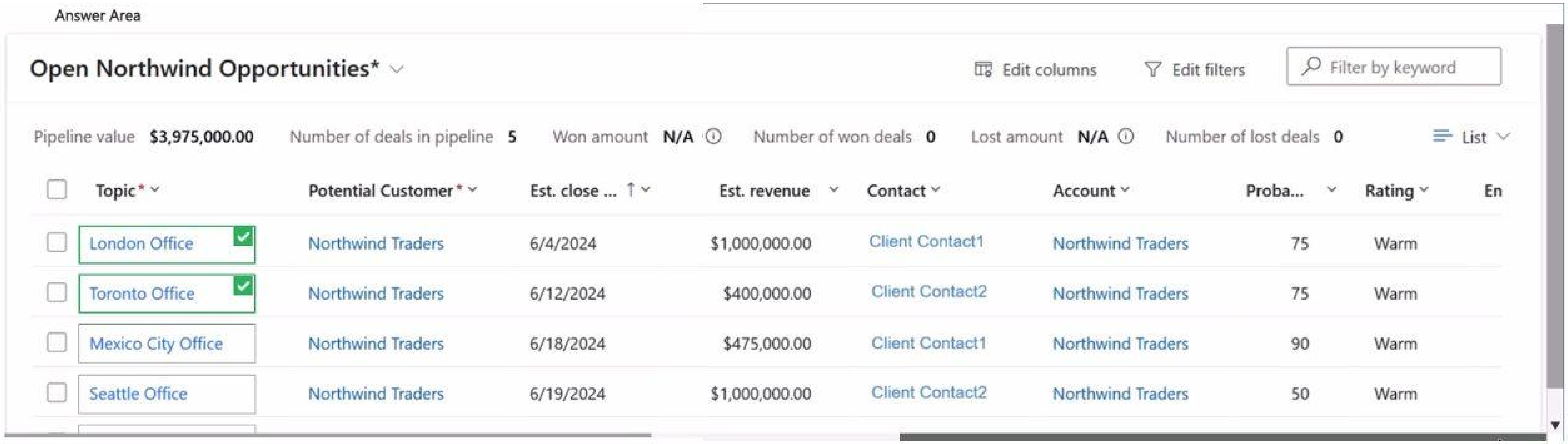
Answer Area:



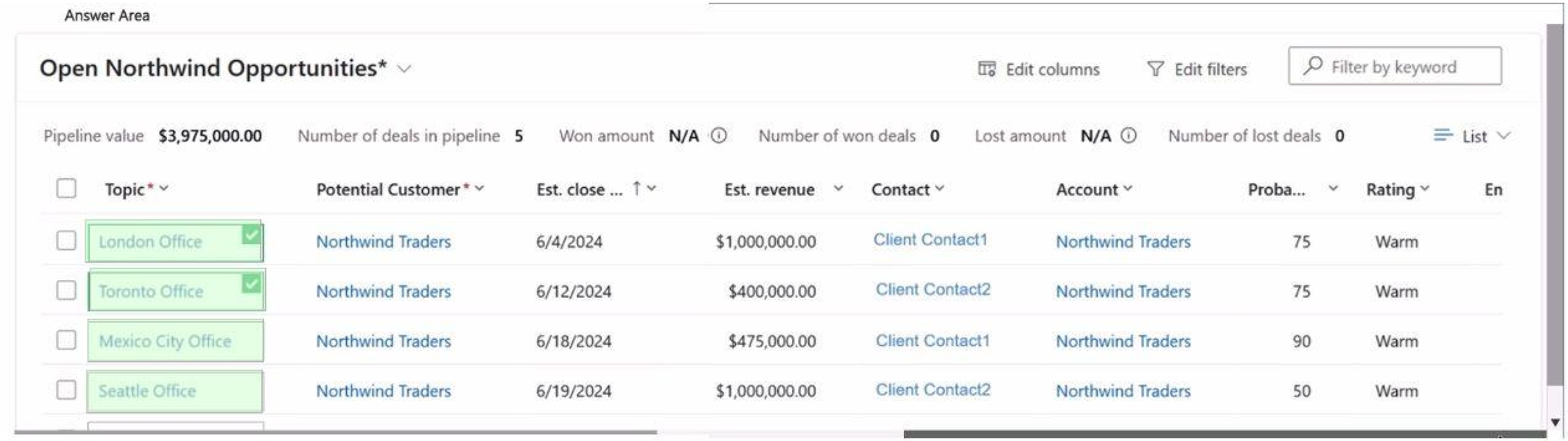
Section:
Explanation:

QUESTION 13
HOTSPOT
BDM1 logs into the Sales Hub on June 3. 2024. BDM1 opens the assistant from the navigation bar.
Which two open opportunities will BDM1 see mentioned in the close date coming soon reminder cards? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:



Section:
Explanation:

QUESTION 14
One of the data sources being ingested into Dynamics 365 Customer Insights - Data is Microsoft Dataverse. During the unification process, you need to identify the primary key.
Which three data types can you use as a primary key attribute? Each correct answer presents a complete solution. Choose three. NOTE: Each correct selection is worth one point.

A. Integer
B. Whole Number
C. String
D. Boolean
E. GUID

Correct Answer: B, C, E
Section:
Explanation:
In Dynamics 365 Customer Insights - Data, primary key attributes must uniquely identify records and be consistent across the data source.
Whole Number and GUID are commonly used data types for primary keys because they can uniquely identify records and are natively supported for primary keys in databases.
String can also be used as a primary key if it uniquely identifies each record (e.g., an email address).
Integer and Boolean are generally not used as primary keys in Customer Insights because they may not provide unique identifiers suitable for all scenarios.

QUESTION 15
You are implementing Dynamics 365 Customer Insights - Data as the company's Customer Data Platform. You set up the data sources and start the unification process. You need to identify the primary table within the Matching conditions page.
Which two criteria should you use to determine the primary table? Each correct answer presents a complete solution. Choose two. NOTE: Each correct selection is worth one point.

A. Choose the table with the most complete and reliable profile data about your customers.
B. Choose the table that has the most related tables.
C. Choose the Dynamics 365 contact\ab\e when this is available as the data source.
D. Choose the table that has several attributes in common with other tables.

Correct Answer: A, C
Section:
Explanation:
When determining the primary table in Customer Insights during the unification process, the goal is to choose the table that provides the most robust and accurate customer profile information.
Criterion A is crucial because having complete and reliable customer profile data ensures that the unified profile is accurate and comprehensive.
Criterion C is recommended by Microsoft when using Dynamics 365 data, as the contact table often serves as the primary source of customer information within the Dynamics 365 ecosystem.
While tables with many related tables or common attributes with other tables may provide supplementary information, they do not necessarily constitute the primary source for reliable customer data.

QUESTION 16
You are a marketing automation consultant.
Your customer wants to understand the benefits of using the query assist feature in Dynamics 365 Customer Insights - Journeys. Why might your customer want to use this feature?

A. Using the natural language feature allows marketers to build segments using simple words to specify what audience they want to target.
B. When looking at a marketing journey created by another user, the natural language feature makes it easier to understand the logic of the journey and decide whether it meets the campaign goals.
C. Using the natural language feature allows marketers to search Dataverse to retrieve single records using a right-hand pane on the model-driven app
D. When looking at a segment created by another user, the natural language feature makes it easier to identify which journeys the segment is used in.

Correct Answer: A
Section:
Explanation:
The Query Assist feature in Dynamics 365 Customer Insights - Journeys utilizes natural language processing to help marketers easily build segments.
By using simple language, marketers can describe their target audience without needing to know complex query syntax, making segmentation more accessible.
This feature is designed to streamline segment creation, allowing marketers to quickly define their audience with natural language inputs, which is particularly useful for users who may not be familiar with technical query building.

QUESTION 17
You created and published lead scoring models in the Dynamics 365 Customer insights - Journeys application.
Your marketing team members inform you that they are NOT able to view the lead scoring insights. You confirm the lead scoring models are published and are Live.
You need the marketing team to be able to view the lead scoring insights.

A. Re-publish the lead scoring models to allow the system to capture the insights.
B. Assign the Lead Score Viewer security role to the users.
C. Set all leads to Active state to capture the insights.
D. Set automatic lead scores cleanup to No lo capture the scoring.

Correct Answer: B
Section:
Explanation:
For team members to view lead scoring insights, they must have appropriate permissions, specifically the Lead Score Viewer role in Dynamics 365 Customer Insights - Journeys.
Even though the lead scoring models are published and live, without the correct security role, users will not have access to view the insights.
Assigning the Lead Score Viewer role ensures that the users have the necessary access rights to review the lead scoring insights generated by the models.

QUESTION 18
An organization is using Microsoft Power Query when connecting to data sources in Dynamics 365 Customer Insights - Data. You need to load contacts to Customer Insights - Data using Power Query. Which is an appropriate action to take when using Power Query to ingest data?

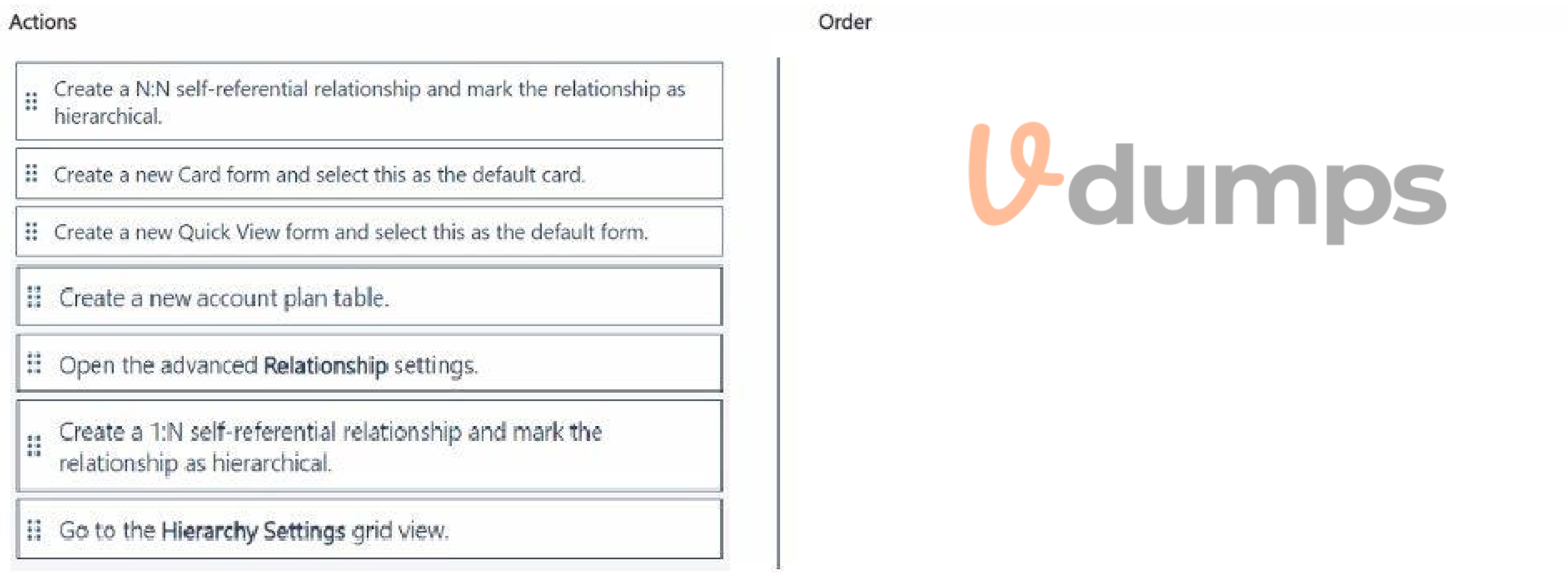
A. You must create a separate Power Query data source for each table you wish to ingest.
B. You can only add additional columns to the dataset in Power Query before the data source is created in Customer Insights - Data.

C. After you save a Power Query data source, you have to manually trigger the initial refresh process.
D. You can add additional tables to the data source using Get Data functionality in the Power Query.

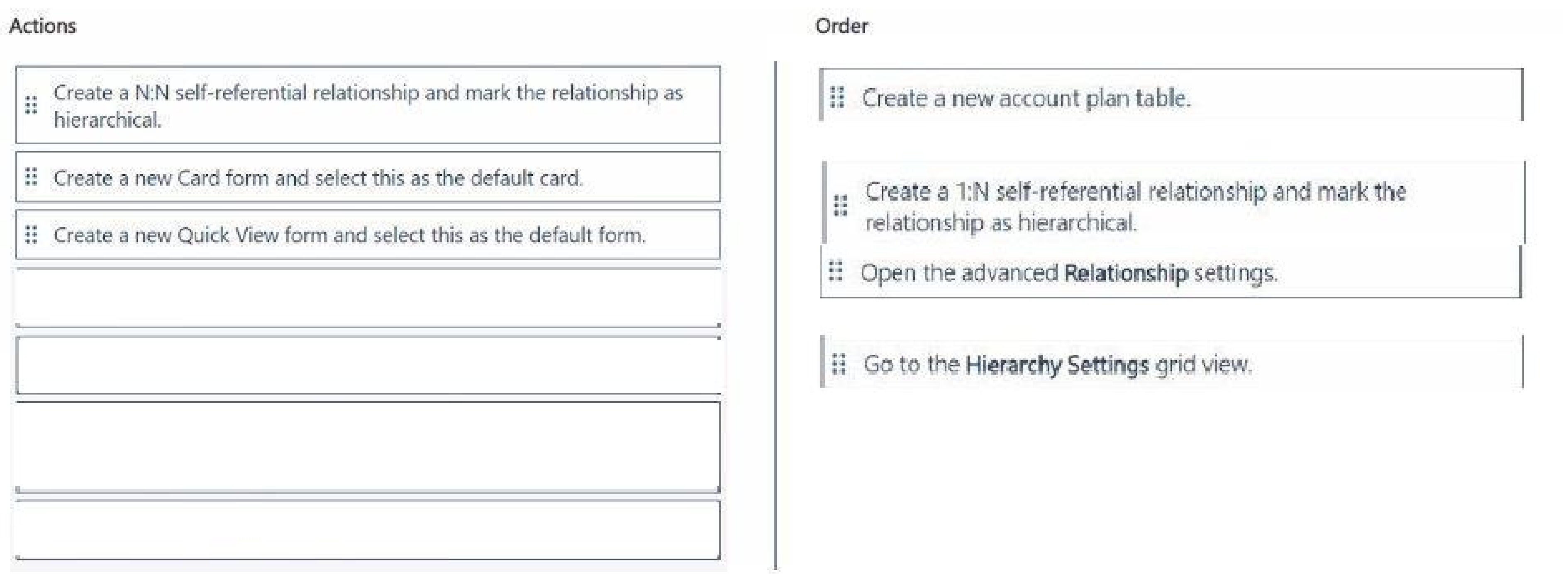
Correct Answer: D
Section:
Explanation:
In Dynamics 365 Customer Insights - Data, when using Power Query to ingest data, the Get Data functionality allows users to add multiple tables from various data sources.
This flexibility enables users to enrich the dataset by pulling in additional tables that may be related or necessary for the data unification process.
Power Query in Customer Insights supports creating robust data flows by allowing multiple tables to be added within a single data source setup, providing a comprehensive data modeling environment.

QUESTION 19
DRAG DROP
Your organization works with larger customers (accounts) that can have a single holding and then many subsidiaries through different levels in a parent-child relationship.
The chief commercial officer wants the sales team to start creating different account plans for each individual subsidiary.
You need to create a new custom account plan table so that records can have the same parent-child relationships as the account records. The relationships must be able to be visualized in a hierarchy.
Which four actions should you perform in sequence before saving and publishing your changes' To answer, move the four appropriate actions from the list of actions to the answer are a. Arrange the four actions in the correct order.

Select and Place:



Correct Answer:



Section:
Explanation:
Create a 1
Self-Referential Relationship and Mark It as Hierarchical:
Establish a self-referential relationship within the Account Plan table where one record can be linked to another within the same table. Choose a 1
relationship type, where one parent account plan can have multiple subsidiary account plans.
Mark this relationship as hierarchical to enable visual representation of the hierarchy. This is essential for tracking parent-subsidiary structures in a hierarchical view.
Open the Advanced Relationship Settings:
After setting up the hierarchical relationship, go to the Advanced Relationship Settings. This allows you to fine-tune options related to cascading behavior, which will control how changes in parent records impact related child records.
Go to the Hierarchy Settings Grid View:
Finally, navigate to the Hierarchy Settings to configure the visualization settings for this relationship. The Hierarchy Settings will enable you to define how the hierarchy is displayed, allowing users to see the parent-child relationships clearly.
Once configured, publish the changes so that users can access the hierarchical view within the system.
By following these steps, you will have configured the new custom account plan table with hierarchical visualization, meeting the requirements to manage and display complex parent-child relationships within your Dynamics 365 system.

QUESTION 20
You are creating a forecast. You want to include only opportunities that sell You need to configure this within the system. What should you configure?

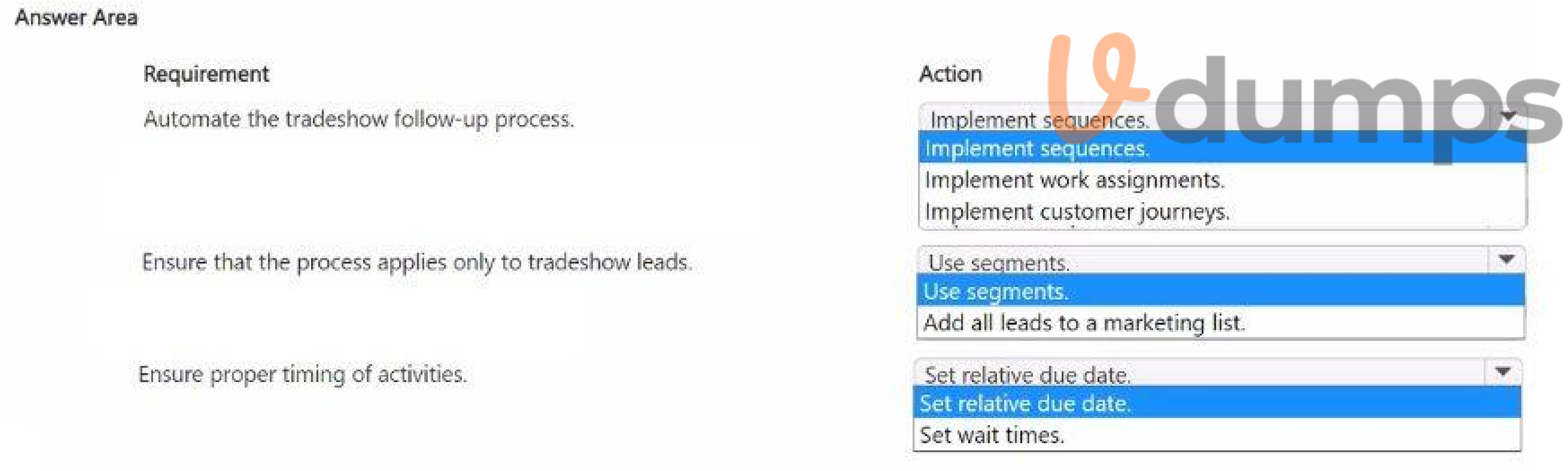
A. separate views
B. additional filters
C. multiple columns
D. premium forecasting
E. advanced features

Correct Answer: B
Section:
Explanation:
Requirement Analysis:
The goal is to include only specific opportunities---those that 'sell'---in the forecast. This requires the ability to selectively include opportunities that meet specific criteria, such as the status, stage, or type of sale.

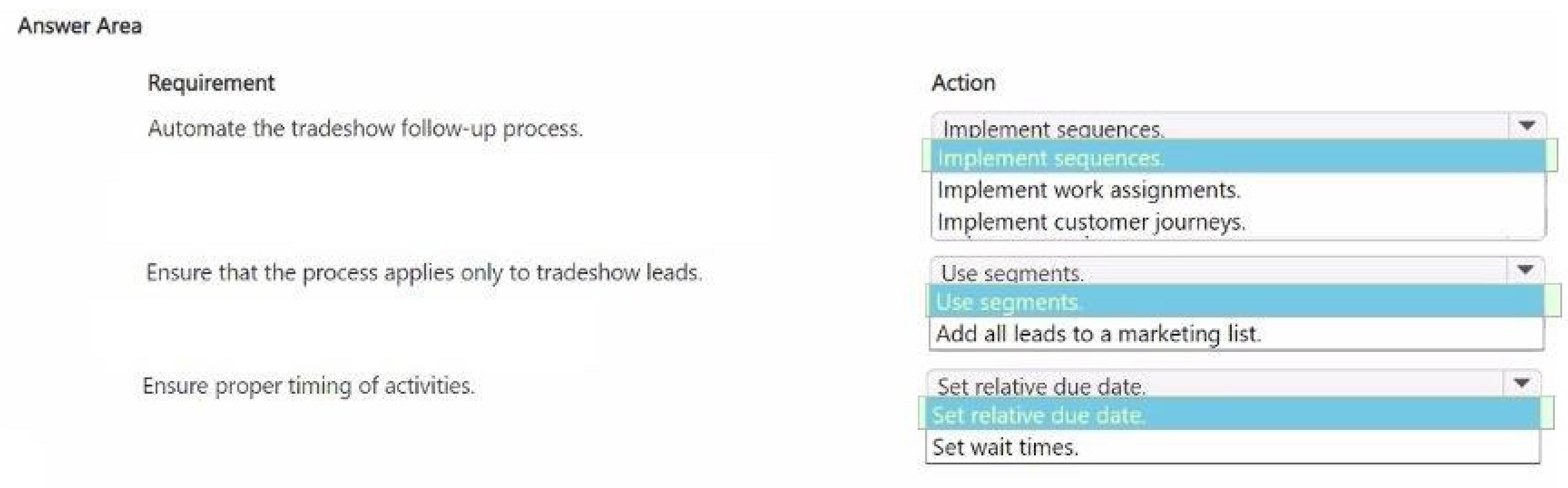
Solution - Using Additional Filters:
In Dynamics 365 Sales, additional filters can be applied within the forecast configuration to refine the opportunities included. Filters allow you to specify criteria such as opportunity status, probability, estimated revenue, or any custom field that signifies the opportunity has 'sold.'
By setting up filters, you can ensure that only opportunities matching the desired criteria are included in the forecast, providing a targeted and accurate view of expected sales.
Steps to Configure Additional Filters in Forecasting:
Go to Sales > Forecasts, and select or create a new forecast.
In the forecast settings, navigate to Filters and add conditions that define which opportunities are included. For example, you can filter based on status (e.g., only include opportunities marked as 'Won').
Save and apply the filter settings to ensure only the relevant opportunities appear in the forecast.
Benefits of Using Filters:
Filters provide flexibility to customize the forecast view, allowing for detailed segmentation of opportunities based on specific conditions.
This approach ensures that the forecast reflects only the opportunities that are relevant to your defined criteria, which in this case is opportunities that have 'sold.'
By using additional filters, you can effectively control which opportunities are included in your forecast, aligning it with specific business needs and improving forecast accuracy.

QUESTION 21
HOTSPOT
A company sends its salespeople to trade shows to meet potential customers. One day after the trade shows, the salespeople currently send a follow-up email manually to the potential customers they met. They would like a task to remind them to call the potential customers a week after that.
You need to increase the follow-up rate for salespeople after a tradeshow.
Which actions should you take? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:



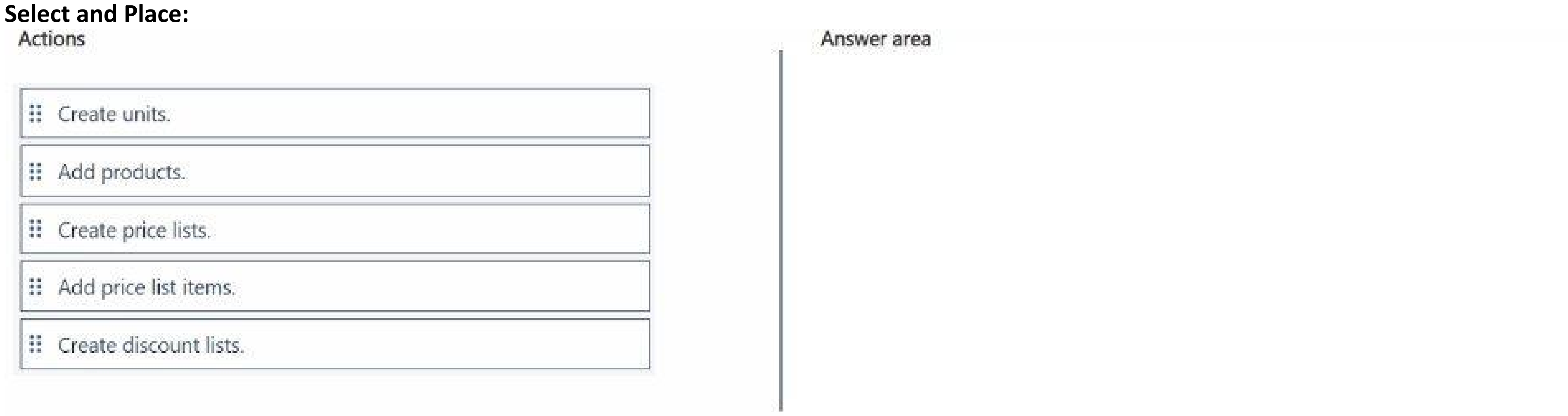
Answer Area:



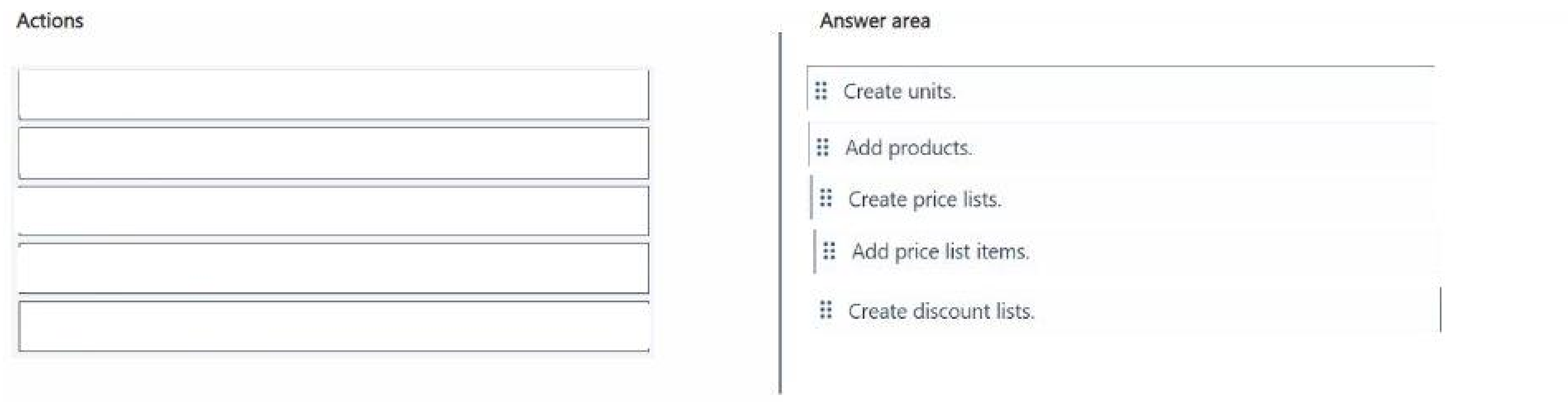
Section:
Explanation:
Ensure That the Process Applies Only to Tradeshow Leads: Use segments
Segments are used to filter leads based on specific criteria. By using segments, you can ensure that the automated sequence is triggered only for leads generated from trade shows.
This action targets the automation specifically at the tradeshow leads, ensuring that other leads are not inadvertently included in this process.
Ensure Proper Timing of Activities: Set relative due date
Setting a relative due date allows you to define a timeframe between actions in the sequence. For example, the follow-up call task can be scheduled for one week after the initial email.
This ensures that tasks are executed with the correct timing, aligning with the desired schedule of following up with potential customers one week after the first contact.
By implementing sequences to automate follow-ups, using segments to filter for tradeshow-specific leads, and setting relative due dates for timely task execution, the company can optimize its post-tradeshow follow-up process and enhance the likelihood of successful customer engagement.

QUESTION 22
DRAG DROP
A company uses Dynamics 365 Sales to manage product lines.
You need to set up the product catalog, including the ability for sellers to apply quantity discounts.
In which order should you perform the actions? To answer, move all actions from the list of actions to the answer area and arrange them in the correct order.
NOTE: More than one order of answer choices is correct. You will receive credit for any of the correct orders you select.

Select and Place:



Correct Answer:



Section:
Explanation:
Add Products:
After units are created, add products to the catalog. Each product will have an associated unit and a description that defines it within the catalog.
Ensure products are added with complete details to enable proper pricing and discounting later.
Create Price Lists:
Next, create price lists that define the pricing for products. Price lists can be specific to regions, customer types, or other criteria and are essential for associating products with prices.
A price list is necessary for assigning product prices, enabling you to link prices with discount lists in the subsequent steps.
Add Price List Items:
Add price list items to assign specific products to price lists and set their prices. This links each product with its pricing based on the price list created earlier.
It allows flexibility to have different pricing structures for the same product across multiple price lists if needed.
Create Discount Lists:
Finally, create discount lists to apply quantity discounts on products. Discount lists define percentage or flat rate discounts based on purchase quantities, which can then be applied when products are added to sales orders or quotes.
This step ensures that sellers can apply quantity-based discounts, meeting the requirement for the product catalog setup.
By following these steps in the specified order, you can set up a product catalog that includes units, products, price lists, price list items, and discount lists, allowing sellers to manage product pricing and apply quantity discounts effectively.

QUESTION 23
You have opportunities that have values in multiple currencies. You manually update currency exchange rates once per month. You need to ensure that currency values are accurately reported. When is the new currency exchange rate applied to the opportunity records?

A. When an opportunity changes the status reason.
B. When the calculate rollup field system job for the msdyn_projectteam table runs.
C. When the calculate rollup field system job for the account table runs.
D. When an opportunity changes the status.

Correct Answer: A
Section:
Explanation:
In Dynamics 365 Sales, currency exchange rates are applied to opportunity records when specific triggers occur. These exchange rates are updated manually on a periodic basis (e.g., once a month) to reflect current currency values.
Exchange rates are recalculated for an opportunity when there is a change in the status reason (e.g., from open to won or lost). This trigger ensures that the most recent exchange rate is used when key changes occur in the opportunity lifecycle, maintaining accurate currency reporting.

QUESTION 24
You are the Dynamics 365 Sales administrator for an electronics company.

The sales team is having difficulty locating different products in the same category - for instance; all versions of flat screen TV available.
You need to make it easier for the sales team to navigate through products via taxonomy.
What should you use?

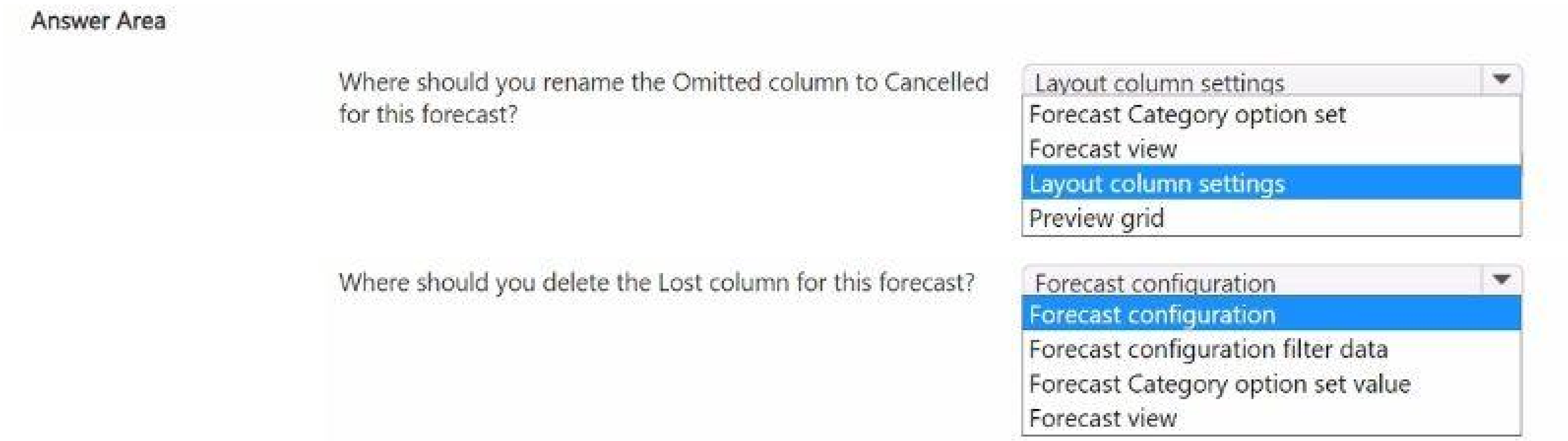
A. Product families
B. Product unit groups
C. Related products
D. Product bundles

Correct Answer: A
Section:
Explanation:
Product families allow you to group related products under a common category, making it easier for the sales team to navigate and find products within the same category, such as all versions of flat-screen TVs.
By using Product families, you can organize products into a hierarchical structure that reflects their categorization, enabling sales users to browse and select items more efficiently within Dynamics 365 Sales.
Using product families, you can streamline the user experience and improve navigation within the product catalog by grouping similar products together, which simplifies the search process for sales teams.

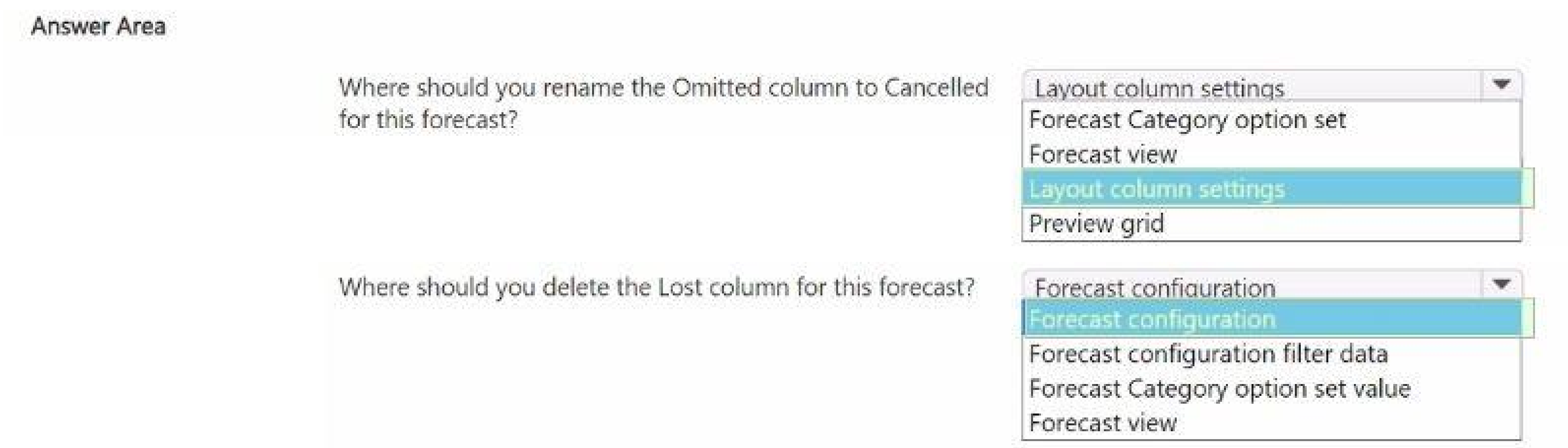
QUESTION 25
HOTSPOT
You are a Dynamics 365 Sales administrator. You create a forecast by using the forecast category layout shown in the exhibit:

Use the drop-down menus to select the answer choice that answers each question based on the information presented in the graphic.
NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:



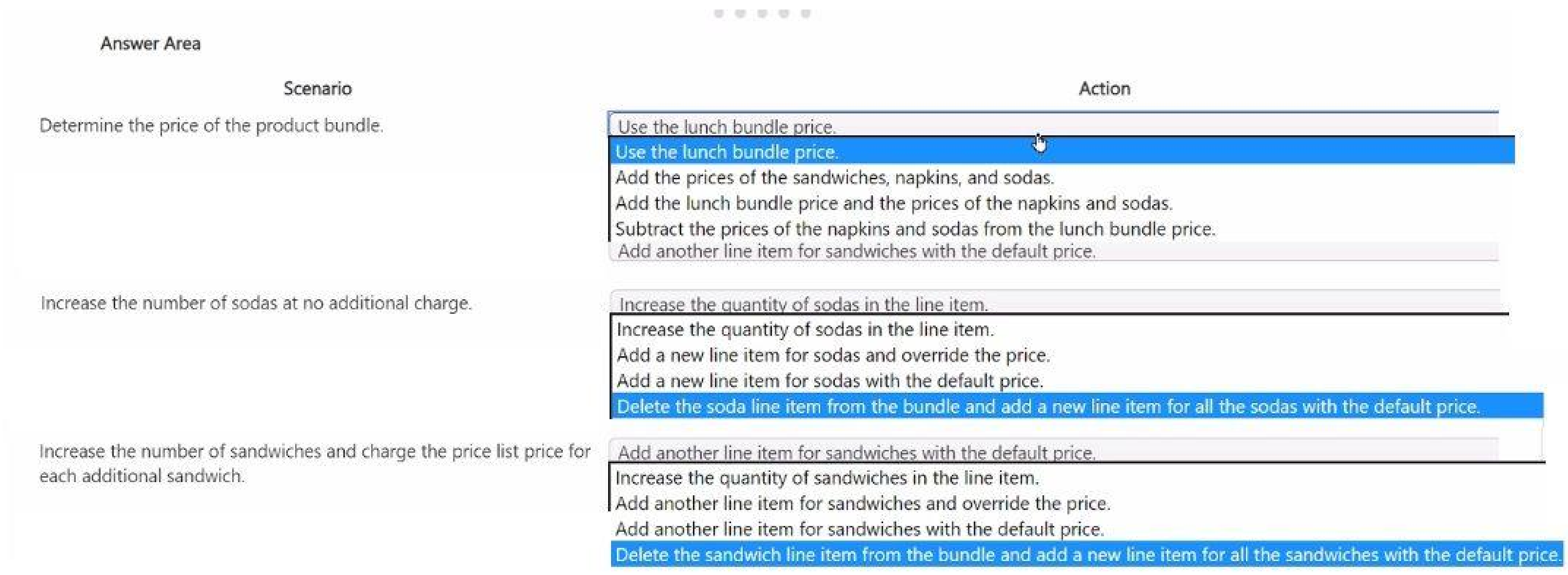
Section:
Explanation:
Deleting the Lost Column from the Forecast:
To remove a column entirely, such as the Lost column, you should adjust the Forecast configuration. This configuration setting allows you to add or remove columns from the forecast grid.
Modifying Forecast configuration affects the structural aspects of the forecast, such as which columns are included, based on what is necessary for reporting and analysis.
By utilizing the Layout column settings for renaming columns and the Forecast configuration for adding or removing columns, you can tailor the forecast layout to meet specific business requirements, ensuring the forecast view is both relevant and easy for users to interpret.

QUESTION 26
HOTSPOT
You are a Dynamics 365 Sales consultant for a food service company. The company caters meals for client companies.
The company wants to set up a product bundle so that the sales staff does not forget items when they create an opportunity.
The lunch bundle is created at $200.00. It will include the following.

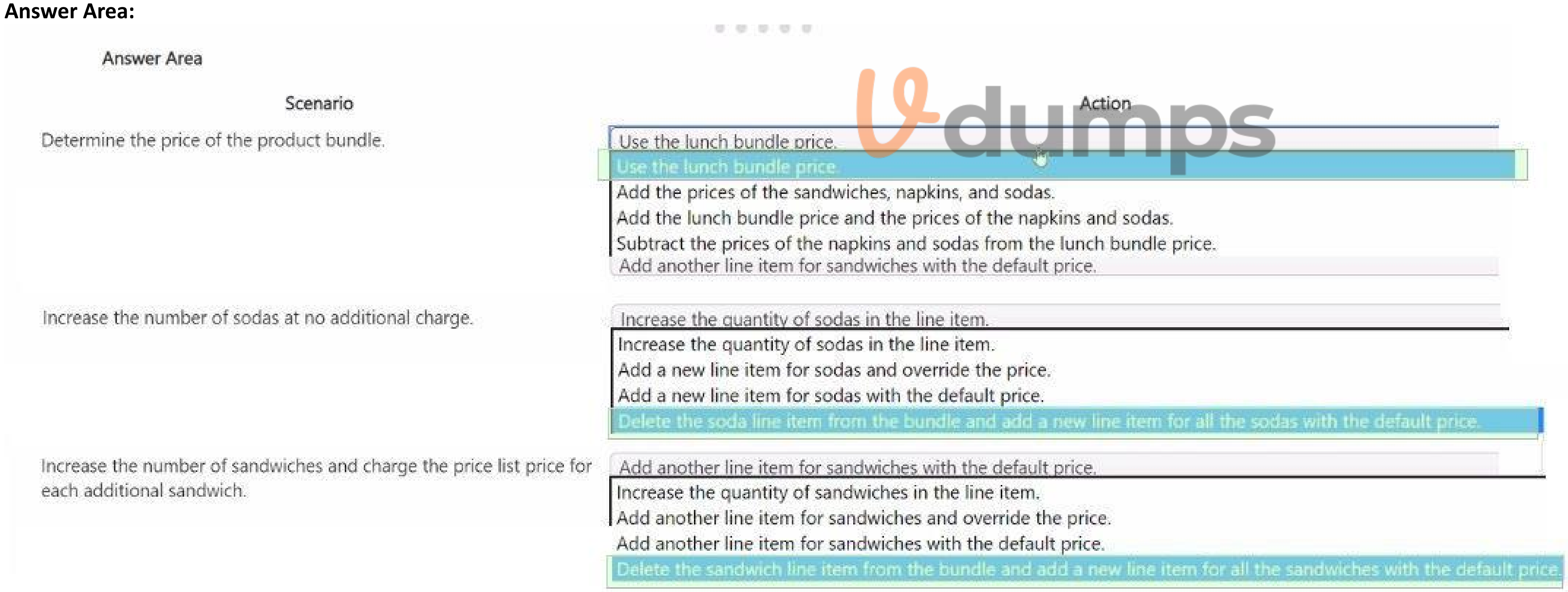
Product	Quantity	Unit Cost	Amount	Configuration
Sandwich	50	$5.00	$250.00	Required
Napkins	50	$0.25	$12.50	Optional
Soda	50	$1.00	$50.00	Optional

You need to explain how the sales staff should manage the product bundle in the opportunity. What should they do for each scenario? To answer, select the appropriate options in the answer are a. NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:

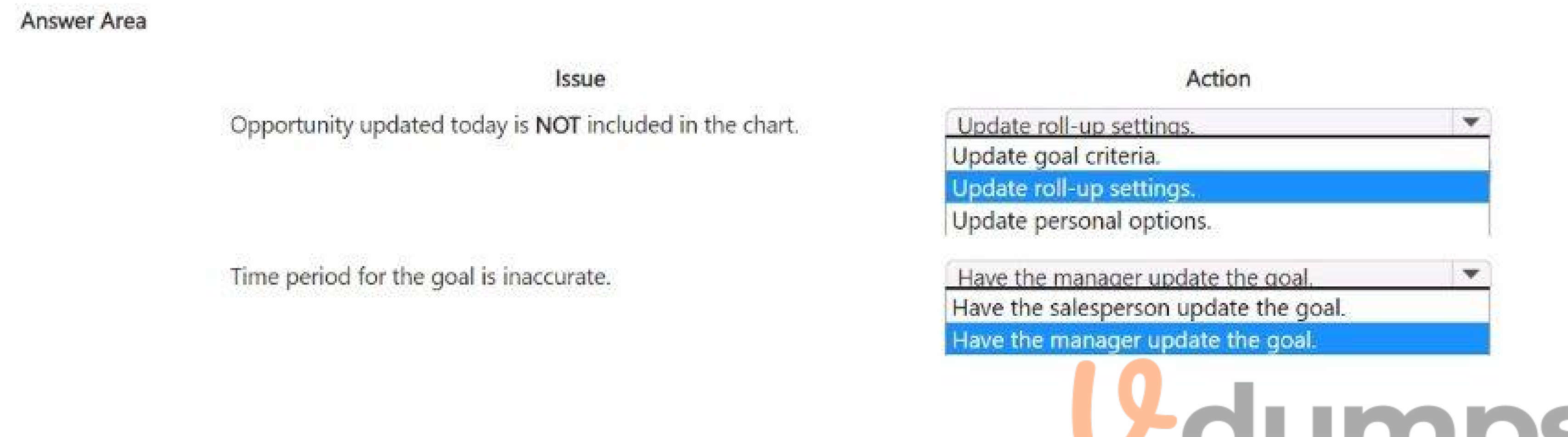


Section:
Explanation:
Increase the Number of Sodas at No Additional Charge: Increase the quantity of sodas in the line item
To add sodas without impacting the price, sales staff can simply increase the quantity of sodas in the line item. This approach allows flexibility within the bundle without altering the overall bundle cost, which remains fixed.
Increase the Number of Sandwiches and Charge the Price List Price for Each Additional Sandwich: Add another line item for sandwiches with the default price
To charge extra for additional sandwiches, the staff should add another line item for sandwiches. This line item would use the default price from the price list, ensuring that any additional sandwiches beyond the initial bundle are charged accordingly.
This allows the base bundle to remain consistent while additional items are billed separately based on the standard price list.

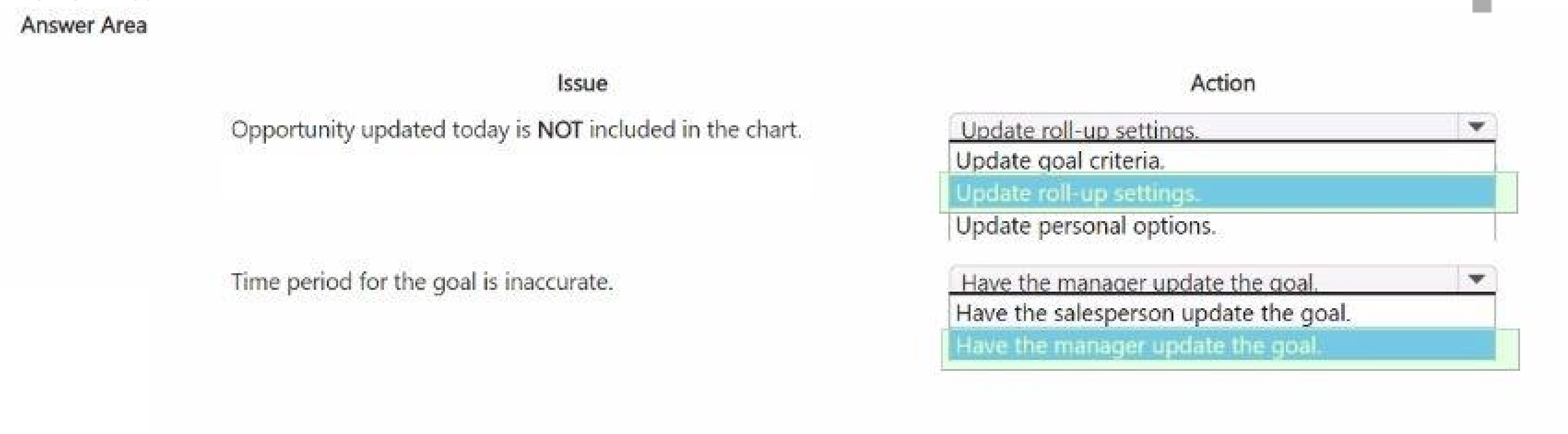
By following these guidelines, the sales staff can effectively manage the product bundle within opportunities, maintaining pricing consistency while allowing flexibility for additional items as required by the client.

QUESTION 27
HOTSPOT
You are a Dynamics 365 administrator. The sales team uses goals to track actual to target opportunity amounts.
A salesperson reviews their goals chart and observes the following:
* An opportunity updated today is not included in the chart.
* The time period for the goal is not accurate.
You need to resolve these issues.
What should you do? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:



Section:
Explanation:
Time Period for the Goal is Inaccurate: Have the manager update the goal
If the goal's time period is incorrect, the data might not align with the expected reporting period. To correct this, you need to have the manager update the goal to ensure that the time period accurately reflects the intended tracking duration.
Managers typically have the required permissions to adjust goal settings, including the start and end dates, which directly affect how goals are calculated and displayed.
By updating the roll-up settings and ensuring the goal's time period is correct, you can address these issues, ensuring that the goal chart reflects accurate and up-to-date information for the sales team.

QUESTION 28
You are a Dynamics 365 Sales administrator. You are setting up a product catalog. You need to configure the base unit group. Which quantity or measurement should you configure?

A. the least frequently used to sell the service
B. the lowest needed to sell the product or service
C. the most frequently used to sell the service
D. the highest needed to sell the product or service

Correct Answer: B
Section:
Explanation:
Understanding the Base Unit in Dynamics 365 Sales:
In Dynamics 365 Sales, the base unit represents the smallest quantity or measurement used to sell a product or service. It serves as the foundational unit within a unit group, which allows you to define how a product can be measured and sold in various quantities.
All other units within the unit group are defined in relation to this base unit. Therefore, it should represent the smallest quantity possible, ensuring flexibility in defining larger units or multiples based on this standard.
Selecting the Base Unit - Why the Lowest Quantity?
Choosing the lowest needed unit ensures that any other units, whether they are multiples or larger groupings, can be accurately calculated in relation to the base unit. This approach allows you to accommodate various selling quantities and ensures precise calculations across different unit types.
For example, if the lowest unit is a single item, you can then configure units such as a dozen, box, or case based on this base unit. This provides consistency and accuracy in pricing and inventory management.
Benefits of Using the Lowest Needed Unit:
Configuring the base unit as the smallest measurable unit enables flexibility and supports various sales scenarios without restrictions. It simplifies the management of units and ensures that other unit variations align correctly in the product catalog.
By setting the base unit to the lowest quantity needed to sell the product or service, you establish a robust foundation for building out the unit group and accommodating different sales quantities in Dynamics 365 Sales.

QUESTION 29
You are the Dynamics 365 administrator for a group of financial advisors.
Advisors must use one business process flow to guide them through the standard lead to invoice process.
Each table has the following number of stages and steps:

Table	Number of Stages	Number of Steps per Stage
Lead	10	10
Opportunity	10	10
Quote	10	10
Order	10	10
Invoice	10	10

You need to modify the business process flow to make it valid. What should you reduce?

A. number of steps per stages
B. number of tables
C. total number of steps
D. total number of stages

Correct Answer: D
Section:
Explanation:
In Dynamics 365, business process flows are limited to 30 stages across all entities within a single process. Since each entity here (Lead, Opportunity, Quote, Order, Invoice) has 10 stages, the total would be 50 stages, exceeding the limit.
To meet the requirements, you need to reduce the total number of stages to comply with this limitation. Reducing the total number of steps per stage, tables, or steps won't directly address the stage limit issue.

QUESTION 30
The analytics team at your organization has created Power BI reports that enrich data about your accounts from Dynamics 365 Sales with data NOT contained in Dynamics 365 Sales. The Power BI reports are referenced by

your executive leadership as the primary source of truth about account success metrics. Sales leadership has requested that sales users can see these insights about the accounts they have access to within Dynamics 365 Sales. You need to enable the insights to be available to sales users in Dynamics 365 Sales. What should you do?

A. Provide a link to the Power Bl report in the ribbon on the account form.
B. Create a dashboard in Dynamics 365 Sales that contains account data.
C. Embed the Power Bl Dashboard as a dashboard in the Dynamics 365 Sales application.
D. Embed the Power Bl report using contextual filtering for accounts.

Correct Answer: D
Section:
Explanation:
To make Power BI insights available within Dynamics 365 Sales, specifically contextualized for accounts, you should embed the Power BI report with contextual filtering. This ensures that the report dynamically adjusts based on the specific account record a user is viewing.
Embedding with contextual filtering enables sales users to see account-specific insights directly within the Dynamics 365 interface, improving accessibility and relevance.

QUESTION 31
A company created a new table named Locations.
The sales team needs your help to make the Locations table visible in the Sales Hub. What should you do?

A. Create a Location Sub Area.
B. Add Location as an Area.
C. Create a Location Group.
D. Add Location to the App Designer.

Correct Answer: D
Section:
Explanation:
To make a new table, like Locations, visible within the Sales Hub, you need to add it to the App Designer. This involves updating the Sales Hub app module to include the Locations table as a new entity that users can access.
By adding the table in the App Designer, you ensure it becomes part of the navigation and is available within the Sales Hub application.